

## North Carolina Charter School Application Evaluation

### Ratings and Sample Scoring Criteria

#### Ratings and Criteria

Evaluators will use this form to provide questions and comments for each subsection.

Members of the Charter Schools Advisory Board will use the following criteria to rate applications. Within each subsection, specific criteria define the expectations for a strong response that “Meets the Standard.” Evaluators will rate responses by applying the following guidance:

Rating	Characteristics
Exceeds the Standard	The response reflects a thorough understanding of key issues. It clearly aligns with the mission and goals of the school. The response includes specific and accurate information that shows thorough preparation.
Meets the Standard	The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.
Does Not Meet the Standard	The response is significantly incomplete; demonstrates lack of preparation; is not aligned to the mission and vision of the district or otherwise raises significant concerns about the viability of the plan or the applicant’s ability to carry it out.

An application that merits a recommendation for approval should present a clear, realistic picture of how the school expects to operate; be detailed in how this school will raise student achievement; and inspire confidence in the applicant’s capacity to successfully implement the proposed academic and operational plans.

**In addition to meeting the criteria that are specific to that section, each part of the proposal should align with the overall mission, budget, and goals of the application.**

Evaluation feedback will be based on the written application narrative and appendices.

### Charter School Advisory Board Evaluation Form

School Name:		CSAB Member Name:	
Mission, Purposes, and Goals	Does Not Meet	Meets	Exceeds
Mission Purposes and Goals Notes:			
Education Plan	Does Not Meet	Meets	Exceeds
Education Plan Notes:			
Governance Plan	Does Not Meet	Meets	Exceeds
Governance Plan Notes:			
Operations Plan	Does Not Meet	Meets	Exceeds
Operations Plan Notes:			
Finance/Budget Plan	Does Not Meet	Meets	Exceeds
Finance Plan Notes:			
Overall Evaluation	Does Not Meet	Meets	Exceeds
Overall Notes:			

#### Instructions to Reviewers

Reviewers should use objective language and complete sentences in their comments on the strengths and weaknesses of each section of the application. Please also remember that all documents, including

your individual review, will likely at some time be available to the public. Additional pages should be used as necessary. For example,

**Strengths of the academic plan**

“The plan aligns with the overall mission and vision because...”

“The chosen curriculum is research based and proven effective with the targeted population of students because...”

**Weaknesses of the academic plan**

“The curriculum and daily schedule do not align with the mission and vision because...”

“The discipline plan does not include provisions for students with disabilities.”

**Strengths of the governance plan**

“The governing board has a diverse skillset and will be able to support the school effectively.”

“The plan to recruit school leaders and teachers is robust and aligns with the mission of the school.”

**Weaknesses of the governance plan**

“The governing board is comprised of only two people who do not have sufficient credentials to support school leadership.”

**Strengths of the financial plan**

“The financial plan is sound, and the assumptions are consistent with the mission and vision of the proposed school.”

“The budget includes contingencies for high dollar special needs students and funds are allocated in the budget document for such contingencies.”

**Weaknesses of the financial plan**

“The budget includes a line of credit from ABC Bank, but no assurances were provided to support such an agreement.”

“The proposed school assumes two buses in the first year, but there is no accompanying line item in the budget that allocates funds for purchasing buses nor is there any indication of salary and training for bus drivers.”

Section 1 Mission, Purposes, and Goals

Section 1.1 Mission and Vision
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> <li>• The mission statement defines the purpose of the proposed charter school</li> <li>• The mission statement is clear, concise, compelling, and measurable.</li> <li>• The vision provides a clear description of what the school will look like when it is achieving its mission.</li> <li>• Response includes a compelling description and clear rationale for selecting the location and target student population.</li> </ul>

<ul style="list-style-type: none"> <li>Completed enrollment summary and anticipated demographics charts with reasonable enrollment projections.</li> <li>Response fully justifies the projected student enrollment and the percentage of the ADM when compared to the LEA.</li> <li>Substantial evidence is provided to demonstrate educational need.</li> <li>Target population aligns with the proposed school mission.</li> </ul>	
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Section 1.2 Purposes of the Proposed Charter School	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>Clearly describes how the proposed charter school will achieve one or more of the six legislative purposes.</li> <li>Identified purpose(s) is/are meaningful, manageable, and focused on improving student outcomes.</li> <li>Purposes are clearly aligned to the proposed mission.</li> </ul>	
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Section 1.3 Goals for the Proposed Charter School	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>Performance goals (academic or other) are clear, specific, measurable, attainable, time-specific, and focused on improving student outcomes.</li> <li>Clear and compelling process for setting, monitoring, and/or revising goals at least annually.</li> <li>Goals are clearly aligned to the mission and purposes.</li> </ul>	
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Section 1 Mission, Purposes, and Goals
Additional Notes

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### **Section 1 Mission, Purposes, and Goals**

#### **SUMMARY COMMENTS**

Each part of your summary comments should, in a few sentences, provide a clear understanding of your overall evaluation of the proposal as well as the most significant strengths and/or weaknesses. The summary comments for each section should support your rating for the section and should not be simply cut and pasted from your subsection analysis.

Summary Rating for Entire Mission, Purposes, and Goals
Strengths:
Weaknesses/Questions:

## Section 2 Education Plan

Section 2.1 Instructional Program	
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> <li>• A clear and comprehensive explanation of the school's academic focus that is aligned with the school's mission and vision.</li> <li>• A clear and coherent description of the instructional program and instructional methods are provided.</li> <li>• The proposed assessment strategies align with the proposed instructional program.</li> <li>• Includes documented evidence that the proposed approach will lead to improved student performance for the school's target student population.</li> <li>• Instructional design offers clear and specific details that describe the basic learning environment, class size, and structure.</li> <li>• Curriculum framework and sample course scope and sequence are clearly presented and specific to the school's purpose, aligned with the school's mission, concentrated to support the target student population, and compatible with the North Carolina Accountability Model.</li> <li>• School calendar and student schedules meet NC requirements of 180 school days or 1025 hours of instruction.</li> <li>• Calendar and schedule support implementation of the academic plan and align with stated mission and vision.</li> <li>• Description of a typical day for teachers and students align with key priorities of the academic plan and the overall mission and vision of the school.</li> </ul>	
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Section 2.1b High School Graduation Requirements and Post-secondary Readiness (High Schools Only)	
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> <li>• Sound plan for meeting NC graduation requirements (including credits, GPA calculation, transcripts, electives) and compelling explanation of any additional requirements beyond the state's requirements.</li> <li>• Clear, persuasive explanation of how the school's graduation requirements will ensure student readiness for college or other post-secondary opportunities (trade school, military service, or entering the workforce).</li> <li>• Effective systems and structures for students at risk of dropping out or not meeting graduation requirements.</li> </ul>	
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Section 2.2 Special Populations and “At-Risk” Students	
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> <li>• An identified founding board member or school administrator with experience working with special populations.</li> <li>• A clear process for identifying “at-risk” students, English Learner students, and intellectually gifted students.</li> <li>• A realistic plan for hiring licensed and highly qualified personnel including service providers, nursing, and educational assistants.</li> <li>• Articulated plan for how the school will utilize and evaluate data to inform instruction and evaluate academic progress for “at-risk” students, English learners, and intellectually gifted students.</li> <li>• A sound, compelling plan is evident to enhance the academic opportunities to meet the needs of “at-risk” students, EL students, and intellectually gifted students.</li> </ul>	
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Section 2.3 Exceptional Children	
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> <li>• A clear process for identifying students with disabilities.</li> <li>• A viable plan to provide students with special needs with instructional programs, practices, and strategies that ensure access to the general education program and academic success.</li> <li>• Requirements and processes for monitoring services to students in need and plans to exit students that attain sufficient progress.</li> <li>• An understanding of, and capacity to fulfill, State and federal obligations and requirements pertaining to students with disabilities.</li> <li>• A realistic plan for hiring licensed and highly qualified personnel including service providers, nursing, and educational assistants.</li> <li>• Evidence of adequate resources and staff to meet the needs of all students, including professional development for teachers.</li> <li>• Articulated plan for how the school will utilize and evaluate data to inform instruction and evaluate academic progress for students with disabilities.</li> </ul>	
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Section 2.4 Student Performance Standards	
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> <li>• Academic achievement goals are rigorous, measurable, and realistic and set high standards and expectations for student learning.</li> <li>• Academic goals contribute to the stated mission and vision of the school.</li> <li>• Clear and compelling process for setting, monitoring, and/or revising academic achievement goals.</li> <li>• Assessment selection will provide sufficiently rich data for evaluation of the academic program and align with state standards.</li> <li>• Assessment plan details the collection and analysis of individual students, student cohorts, and school level performance through out the school year, at the end of the academic year, and for the term of the charter.</li> <li>• A process for using data to support instruction is clearly articulated, with detailed plans to provide adequate training for teachers and school leaders.</li> <li>• Evidence of clear, rigorous promotion/retention and exit policies and standards.</li> <li>• Student attendance goals are realistic and plans to ensure high rates of student attendance and address chronic absenteeism are clearly outlined.</li> </ul>	
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Section 2.5 School Culture and Discipline	
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> <li>• A clear vision for school culture or ethos that will promote a positive academic environment and will reflect high levels of academic expectation and support.</li> <li>• Coherent plan for creating and sustaining the intended culture for students, teachers, administrators, and parents from the school's inception, and for integrating new students and families as they arrive.</li> <li>• Plan for how school culture will embrace students with special needs.</li> <li>• Student discipline plan that provides for effective strategies to support a safe, orderly school climate and strong school culture while respecting student rights.</li> <li>• Evidence of a legally sound school discipline plan that outlines discipline procedures, suspension and expulsion procedures, and appeals processes.</li> <li>• Thoughtful consideration of how the discipline policies protect the rights of students with disabilities.</li> </ul>	
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Section 2 Education Plan Additional Notes

### Section 2 Education Plan

#### SUMMARY COMMENTS

Each part of your summary comments should, in a few sentences, provide a clear understanding of your overall evaluation of the proposal as well as the most significant strengths and/or weaknesses. The summary comments for each section should support your rating for the section and should not be simply cut and pasted from your subsection analysis.

Summary Rating for Entire Education Plan
Strengths:
Weaknesses/Questions:

## Section 3 Governance and Capacity

Section 3.1 School Governing Body/Section 3.2 Governance	
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> <li>• Evidence the proposed board members will contribute the wide range of knowledge, skills, and commitment needed to oversee a successful charter school, including but not limited to educational, financial, legal, and community experience and expertise.</li> <li>• Strong understanding of the roles and responsibilities of a governing board, including structure, size, powers, duties, and expertise that aligns with the school's mission and vision.</li> <li>• Proposed structure is likely to ensure effective governance and meaningful oversight of school performance, operations, and finances.</li> <li>• Clear, appropriate plans for the board to evaluate the success of the school and school leader.</li> <li>• Documentation of a clear structure of the governing board is outlined in an organization chart.</li> <li>• Section includes description of selection and removal procedures, term limits, meeting schedules, and powers and duties of board members, including a conflict of interest policy.</li> <li>• Plans for meaningful board training.</li> <li>• Clear, compelling plans to ensure parents have access to the governing board, including a grievance policy that is fair, transparent, and a plan for communicating the process.</li> <li>• Sound plan and timeline for board recruitment, expansion, and orientation of new members.</li> </ul>	
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Section 3.3 Proposed Management Organization (EMO or CMO) (If Applicable)	
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> <li>• The rationale for contracting with an EMO/CMO is evident.</li> <li>• A persuasive explanation that the proposed relationship with the EMO/CMO will further the school's mission and educational programming.</li> <li>• A clear delineation of the roles, relationships, and responsibilities between the EMO/CMO, the governing board, lead administrator, and public charter school employees.</li> <li>• The rationale includes detailed information regarding the financial and academic performance of other charter schools managed by the EMO/CMO.</li> <li>• A copy of the executed management agreement was included in the application.</li> </ul>	
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Section 3.4 Staffing Plans, Hiring, and Management	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>• Compensation packages, system, and strategy that are likely to attract and retain strong staff.</li> <li>• Recruitment and hiring strategy, criteria, timeline, and procedures that are likely to result in a strong staff that are likely to result in a strong staff and are well suited to the school.</li> <li>• Effective planning for unsatisfactory leadership/teacher performance and turnover.</li> </ul>	
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Section 3.5 Staff Evaluations and Professional Development	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>• Professional development standards, opportunities, and calendar/scheduling effectively support the education program and are likely to maximize success in improving student achievement.</li> <li>• Thoughtful plan for professional development in the areas of special education and EL students, including the implementation of IEP's, discipline of students with disabilities, and communication with EL families.</li> <li>• Detailed evidence that all school staff will receive ongoing focused professional development to effectively implement the school's mission, instructional methodologies, and education program are included.</li> <li>• Details in this section align with proposed budget.</li> <li>• Plan for supporting, developing, and annually evaluating school leadership and teachers that is likely to produce and retain a successful staff.</li> </ul>	
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Section 3.6 Enrollment and Marketing
Characteristics of a strong response:

<ul style="list-style-type: none"> <li>Articulated student recruitment and marketing plan, timeline, and enrollment policy that will provide equal access to all interested students and families, including those in poverty, academically low-achieving students, students with disabilities, and English Language Learners.</li> <li>Details in the section align with proposed budget.</li> </ul>	
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Section 3.7 Parent and Community Involvement	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>Compelling outreach plan that includes community, family, and student involvement, and that is realistic and likely to foster student retention and community support.</li> <li>Description of existing community resources and partnerships already formed that will benefit students and parents and that include a description of the nature, purposes, terms, and scope of services of any such partnerships; and evidence of commitment from identified community partners including documentation of pledged support, if available.</li> </ul>	
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Section 3.8 Admissions Policy	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>Enrollment policy that complies with NC state law, SBE policy, and the Charter Agreement.</li> </ul>	
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Section 3.8b Weighted Lottery (If Applicable)
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Characteristics of a strong response:

- The applicant outlines a weighted lottery process that does not illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.
- The weighted lottery process is not based on geographic boundaries, such as zip code or current public school zones.
- The weighted lottery or limited lottery process is unique to the school's unique mission and provides a thorough explanation of why the school is choosing to use the process.
- Applicant provides a thorough description of the processes and procedures it intends to use to implement the lottery.
- Applicant provides underlying research, pedagogical, educational, psychometric and legal, that supports the request and the procedures the applicant is requesting.

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Section 3.9 Projected Student Enrollment

Characteristics of a strong response:

- The table is complete and displays a realistic projected enrollment growth chart over the first five years.

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Section 3 Governance and Capacity  
Additional Notes

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### Section 3 Governance and Capacity

#### SUMMARY COMMENTS

Each part of your summary comments should, in a few sentences, provide a clear understanding of your overall evaluation of the proposal as well as the most significant strengths and/or weaknesses. The summary comments for each section should support your rating for the section and should not be simply cut and pasted from your subsection analysis.

Summary Rating for Entire Governance and Capacity Plan
Strengths:
Weaknesses/Questions:

## Section 4 Operations

Section 4.1 Transportation Plan	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>• Clear description of a transportation plan that supports daily transportation, extracurricular activities, field trips, etc.</li> <li>• A comprehensive oversight plan that identifies school staff responsible for this oversight.</li> <li>• Description of how the school will arrange transportation for special needs students where necessary</li> <li>• Demonstrated familiarity with state and federal regulations relating to provision of transportation services to students.</li> </ul>	
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Section 4.2 School Lunch Plan	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>• A clear description of how the school will offer food service to all students, adhering to all nutritional guidelines.</li> <li>• A plan to collect free and reduced-price lunch information, including procedures to receive reimbursement.</li> <li>• Adequate funds allocated for school nutrition, aligned with the target student population.</li> <li>• A plan to ensure compliance with applicable state and federal regulations.</li> </ul>	
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Section 4.3 Civil Liability and Insurance	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>• Plan to secure comprehensive and adequate insurance coverage, including worker's compensation, liability, property, indemnity, directors and officers, automobile, crime, errors and omissions, and any other required coverage.</li> <li>• Insurance quote provided aligns with budget assumptions.</li> </ul>	
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Section 4.4b Start-Up Plan	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>• Compelling plan for leading the development of the school from post-approval to opening, including identification of a capable individual or team to lead the planning and start-up.</li> <li>• Adequately addresses potential challenges</li> <li>• Detailed start-up plan specifying tasks and timelines (which are aligned with a sound start-up budget, if applicable)</li> </ul>	
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Section 4.5 Facility	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>• Facility plans are reasonable and adequately meet the requirements of the educational program and anticipated student population.</li> <li>• A sound plan and timeline for identifying, financing, renovating, and ensuring code compliance for a facility.</li> </ul>	
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Section 4 Operations Additional Notes



**Section 4 Operations****SUMMARY COMMENTS**

Each part of your summary comments should, in a few sentences, provide a clear understanding of your overall evaluation of the proposal as well as the most significant strengths and/or weaknesses. The summary comments for each section should support your rating for the section and should not be simply cut and pasted from your subsection analysis.

Summary Rating for Entire Operations Plan
Strengths:
Weaknesses/Questions:

## Section 5 Financial Plan

Section 5.1 Charter School Budget	
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> <li>• Applicant has identified one or more LEA(s) and outlined a realistic revenue projection (state, local, federal) over the next five years.</li> <li>• The enrollment projection aligns with the Total Student Enrollment projections located in Section 1 of the application.</li> <li>• Applicant has provided assurances of identified “other funds” or “working capital.”</li> <li>• Applicant provides a realistic budgetary projection in regards to personnel.</li> <li>• Budget worksheet contains assumptions and reasonable budget numbers that reflect rent, utilities, maintenance, insurance, and build-out costs.</li> <li>• Detailed budget assumptions that include the impact of the anticipated number of students who receive free or reduced price lunches.</li> <li>• Complete, realistic, and viable five year operating budget</li> <li>• Applicant has provided a realistic assessment of projected source of revenue and expenses that ensure the financial viability of the proposed school.</li> <li>• The projection is consistent and aligns with all proposed sections of the application.</li> </ul>	
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Section 5.2 Budget Narrative	
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> <li>• Sound contingency plan to meet financial needs if anticipated revenues are lower than expected.</li> <li>• Individual and collective qualifications for implementing the financial plan successfully, including capacity in areas such as financial management, fundraising and development, and accounting.</li> <li>• Detailed budget narrative that clearly explains reasonable, well-supported revenue and cost assumptions, including grant/fundraising assumptions, identification of the amounts and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated, and including evidence of firm commitments where applicable).</li> </ul>	
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Section 5.3 Financial Compliance	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>Detailed financial procedures, policy, or other reasonable assurance that the proposed school will have sound systems and processes in place for accounting, payroll, and independent annual school level financial and administrative audits.</li> </ul>	
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### Section 5 Financial Plan

#### SUMMARY COMMENTS

Each part of your summary comments should, in a few sentences, provide a clear understanding of your overall evaluation of the proposal as well as the most significant strengths and/or weaknesses. The summary comments for each section should support your rating for the section and should not be simply cut and pasted from your subsection analysis.

Summary Rating for Entire Financial Plan
Strengths:
Weaknesses/Questions:

Application Addendum: Acceleration	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>All questions are adequately addressed and complete</li> <li>The applicant demonstrates a firm need for acceleration by providing appropriate evidences.</li> </ul>	
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Application Addendum: Replication/Conversion	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>• The application contains a strong rational of the reasons for replicating an existing charter school, including evidence this model will be effective in the proposed setting, and the governing board is a good fit for the proposed charter school.</li> <li>• The rationale includes detailed information regarding the financial and academic performance of the existing charter school model.</li> <li>• The applicant provided a copy of the organization's IRS Form 990 for the last three years (Appendix X).</li> </ul>	
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Application Addendum: Alternative	
Characteristics of a strong response: <ul style="list-style-type: none"> <li>• All questions are adequately addressed and complete</li> </ul>	
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